Lead Paint Enforcement SharePoint Project

US ENVIRONMENTAL PROTECTION AGENCY

REGION 7

WATER, WETLANDS, AND PESTICIDES DIVISION

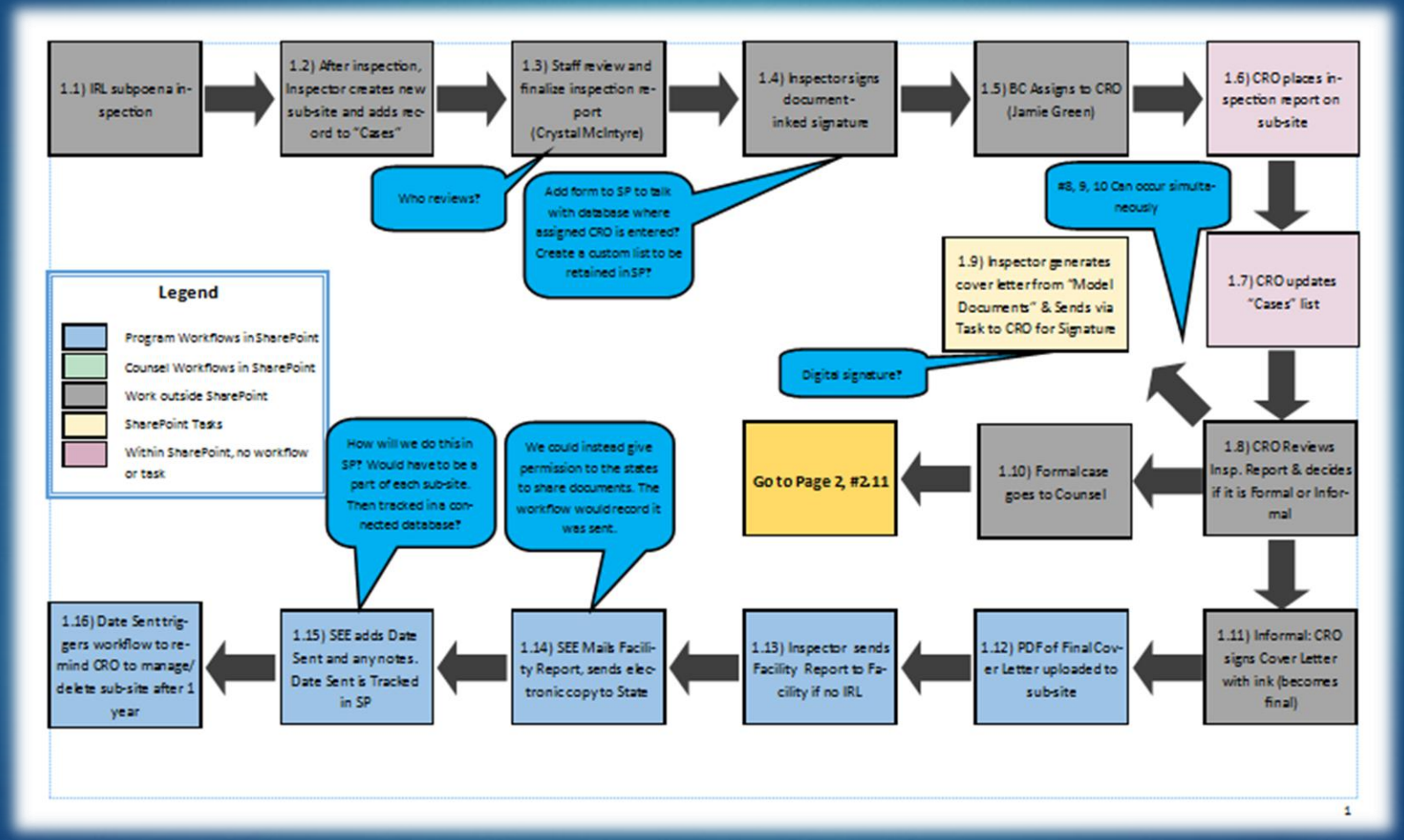
Who We Are

- EPA Region 7
  Water, Wetlands and Pesticides Division
  Toxics and Pesticides Branch
- Responsible for implementing and enforcing Lead-Based Paint rules and regulations
- **Our team:** Jamie Green, Maria Morey, Kelley Catlin, Michael Propst, and Chrislyn Means

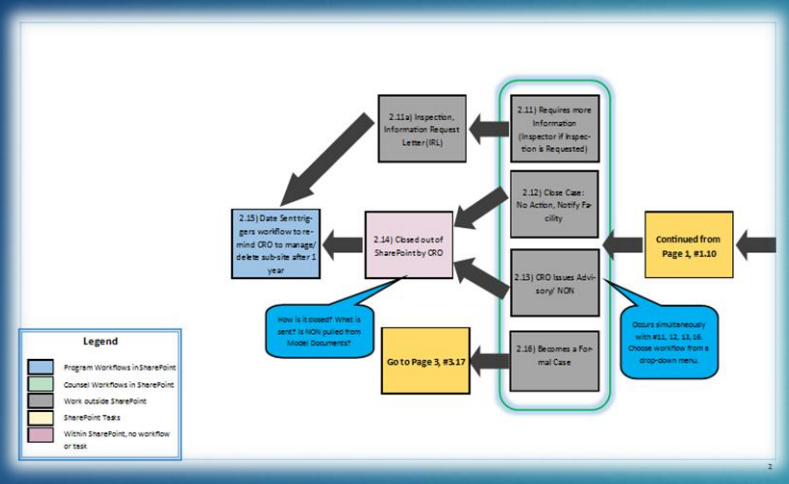
What's our problem?

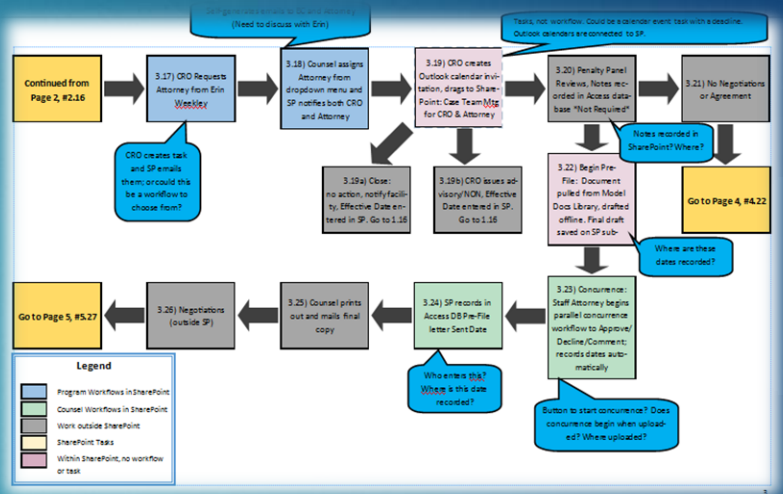
- 80+ inspections per year
- Route paper copies of documents by hand or email copies for review and processing
- Began working on a solution in May 2015

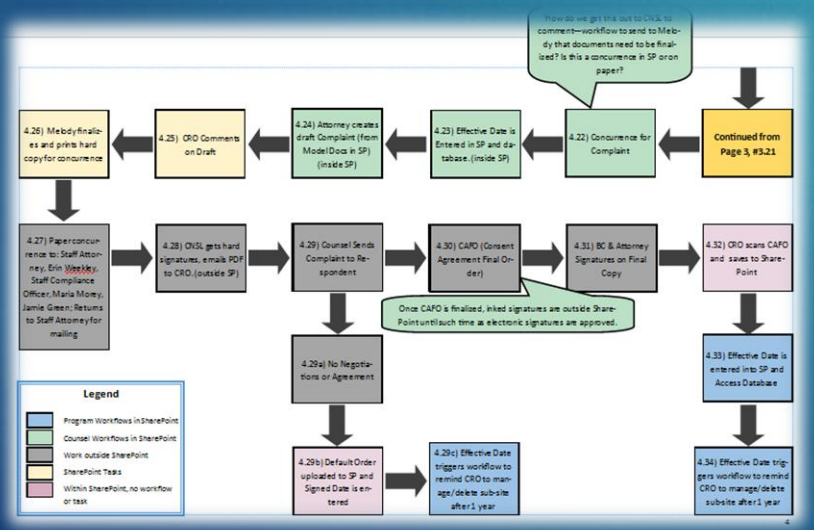
First Step – Map Our Current Process

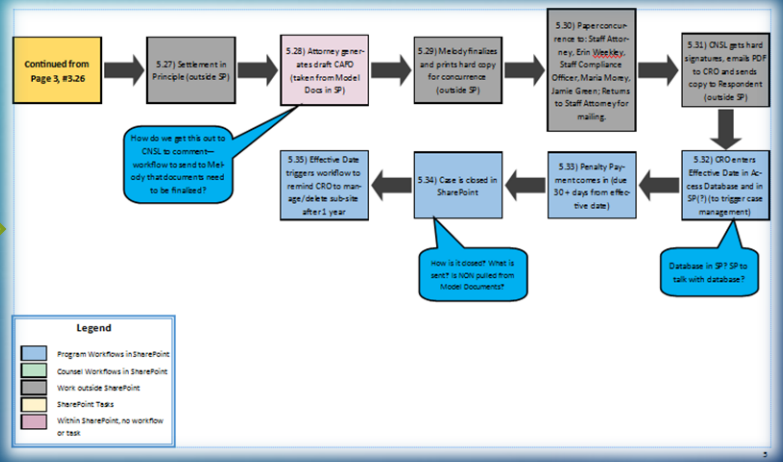


Map Our Current Process – All of it!







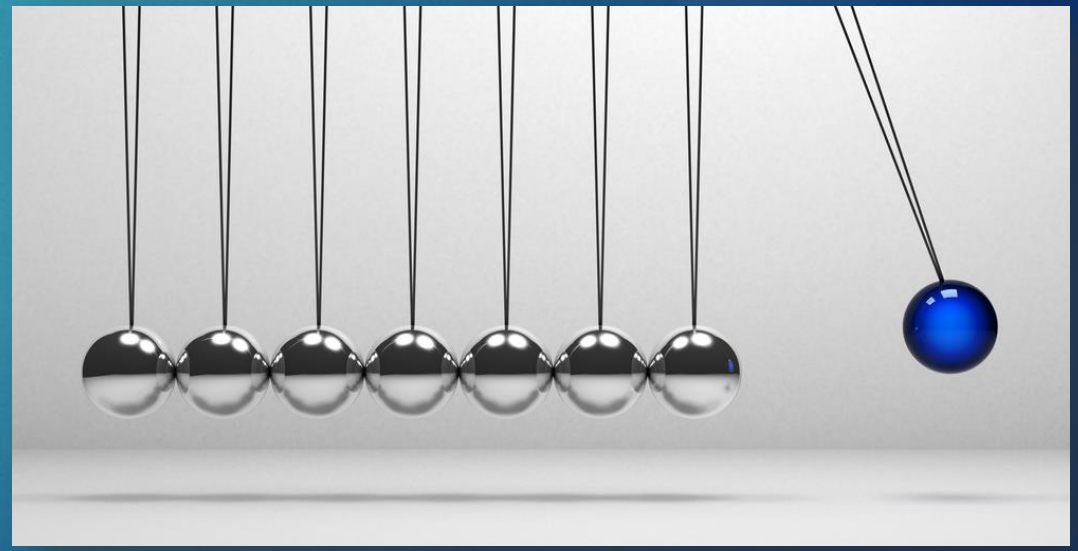


A Solution!

- SharePoint site to automate the concurrence process
- SharePoint
  - Microsoft Office product
  - Create websites
  - Secure place to store, organize, share, and access information from almost any device

Impact

- "One stop" electronic shop for all case related material
  - Inspection
  - Enforcement documents
  - Policy documents
  - Templates
- Accessible to program staff, regional counsel, and management
- **Easily modified to fit other enforcement programs**
  - Media specific
  - Cross Regional
  - Agencies

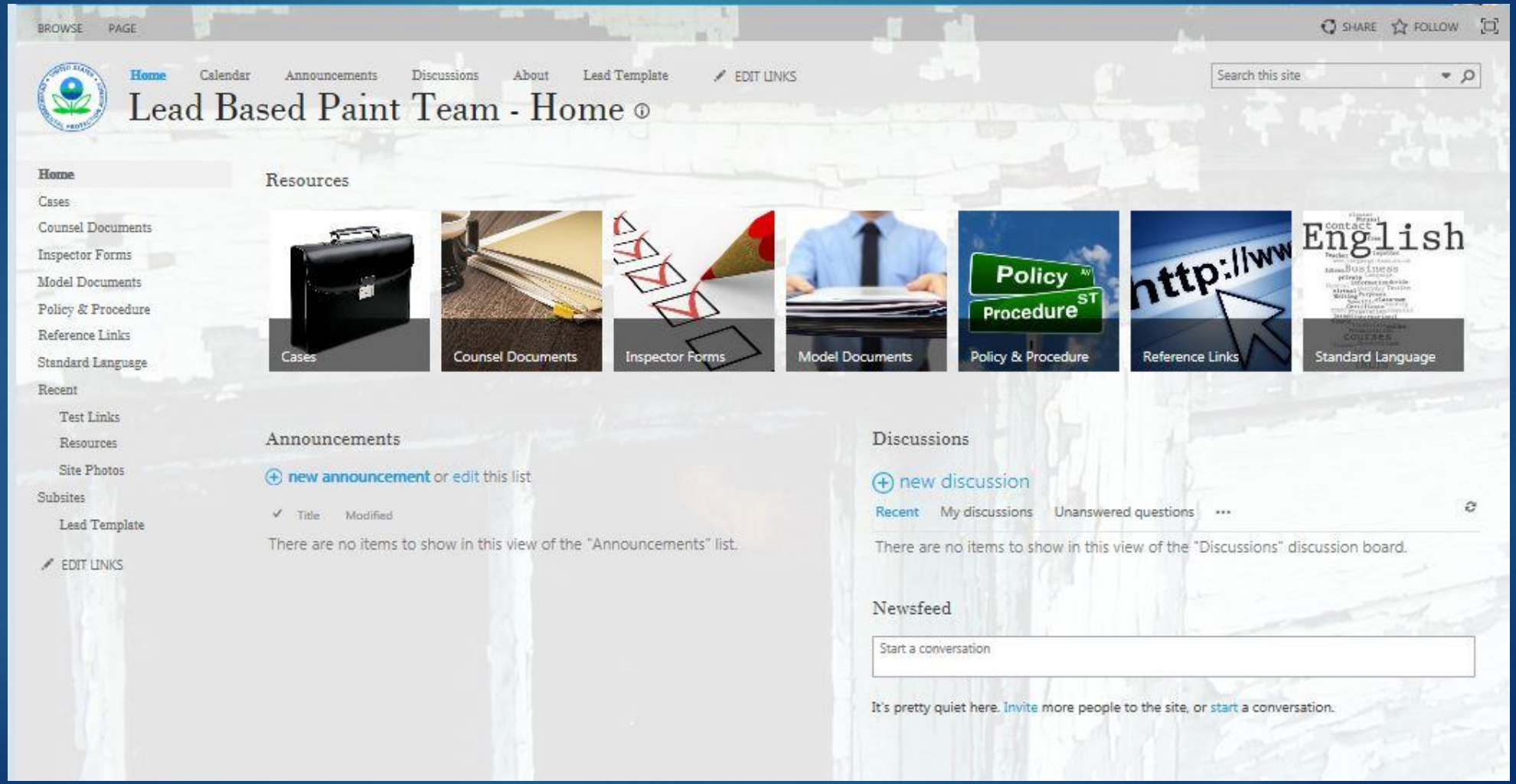


Anticipated Results

- More efficient
  - All electronic records in one location
  - Collaboration and review of case documents
- Easy to access all inspections and case documents
  - Case Review Officer, Inspector, Attorney, and management team
- Less paper routing
- Telework accessible

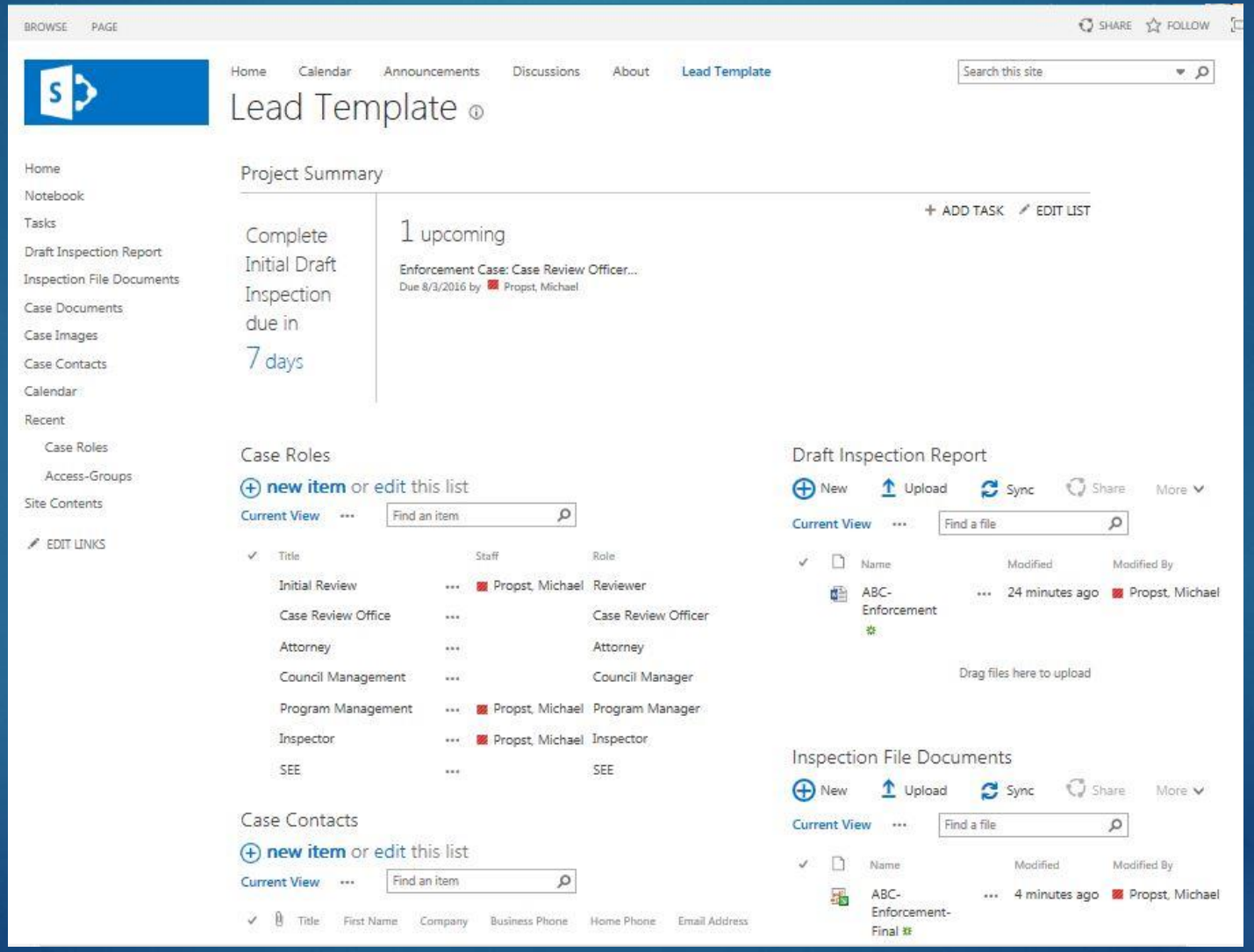
SharePoint Solution

- Structure: tree structure with parent site containing sub-sites for each case
- Benefits: automated process with task driven workflows
- Reporting: allows the role-up of data and provides overview reporting for management



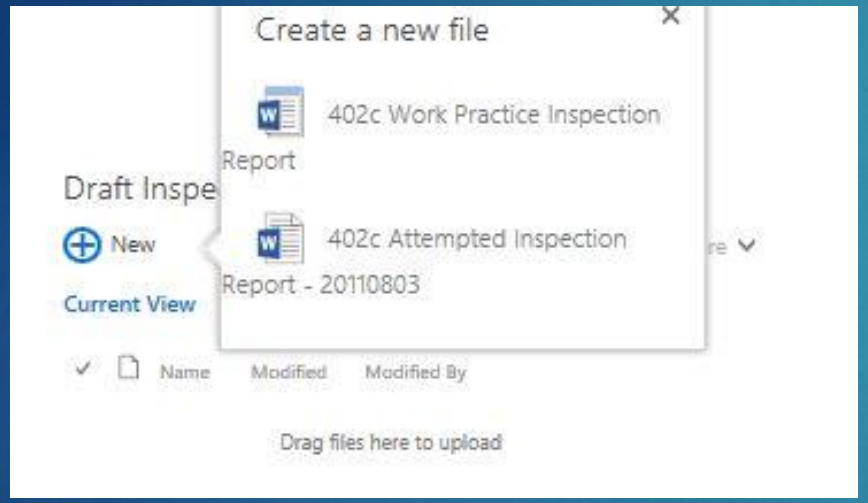
Enforcement sub-site structure

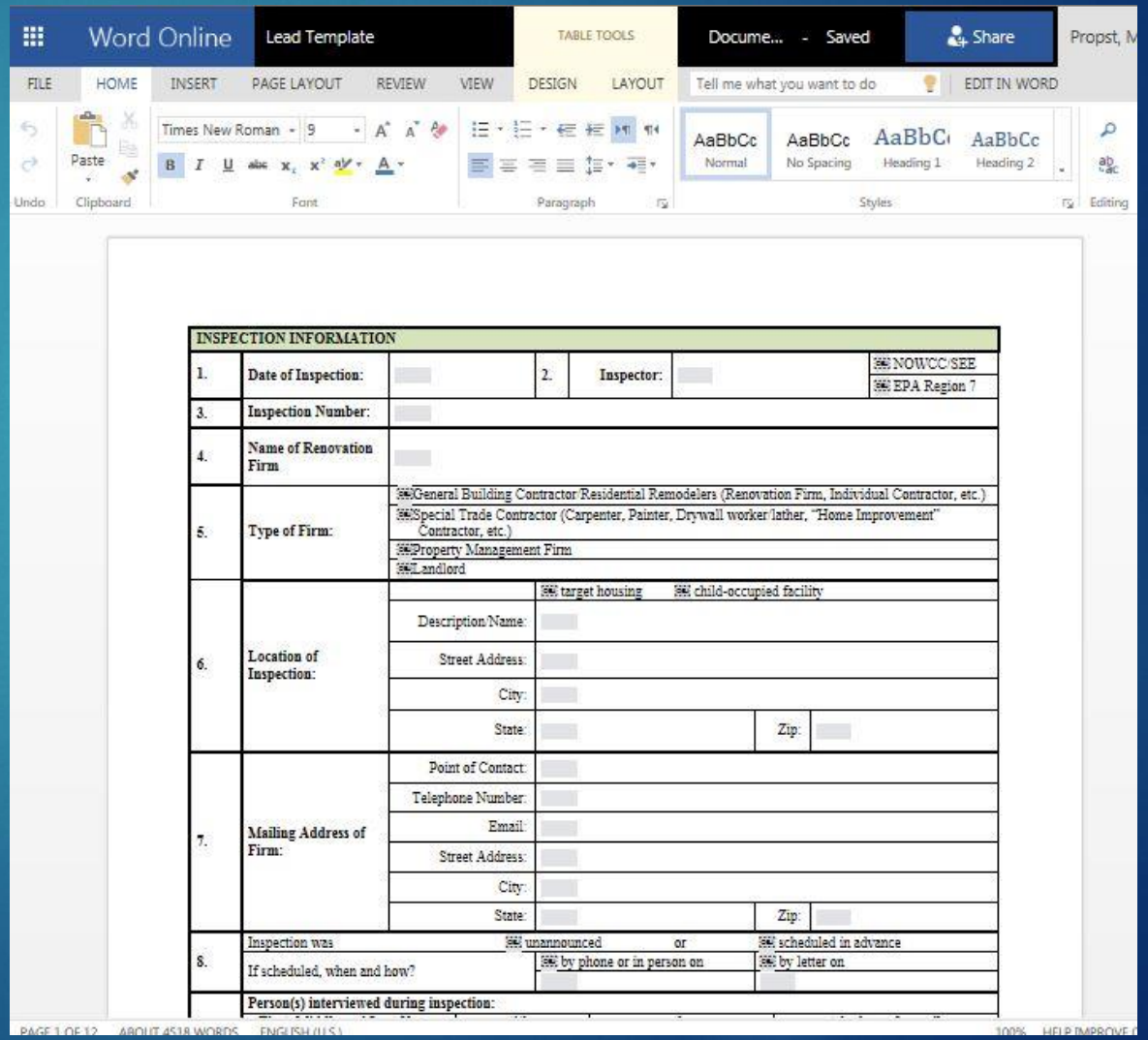
- Created as a site template
- Complete solution with built in workflows



Case Process

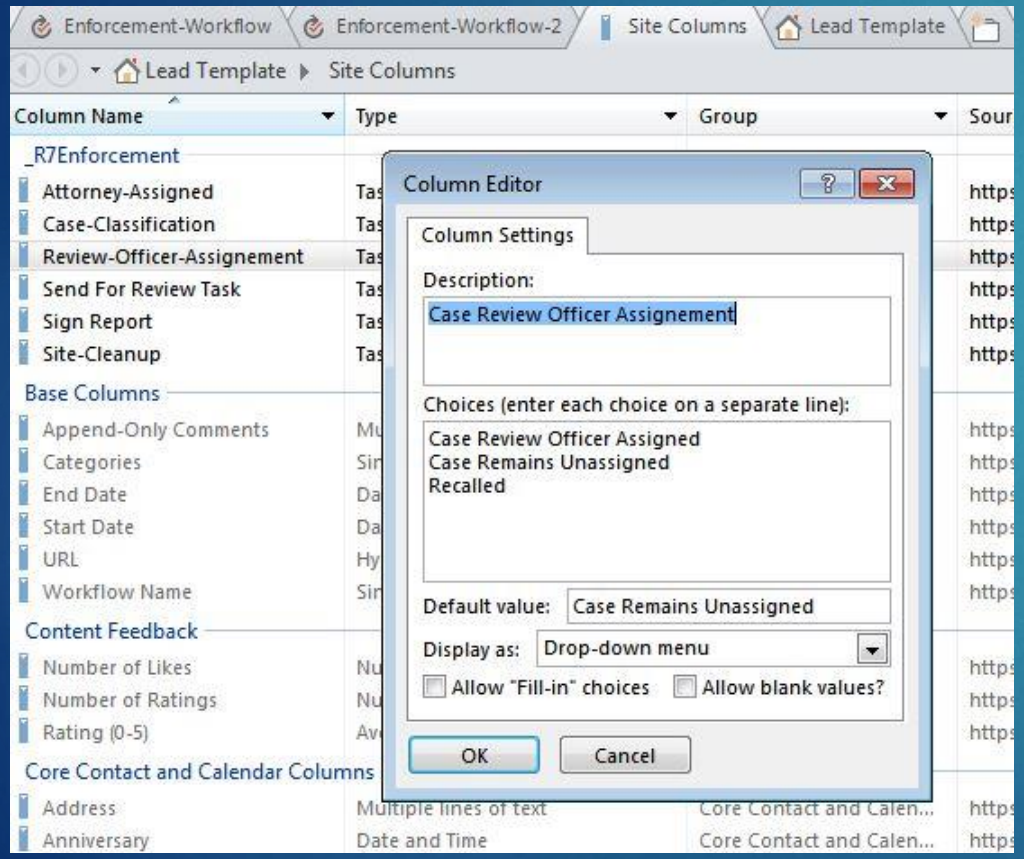
- Task driven workflows based off of document libraries and custom lists
- Enforcement document templates used in libraries

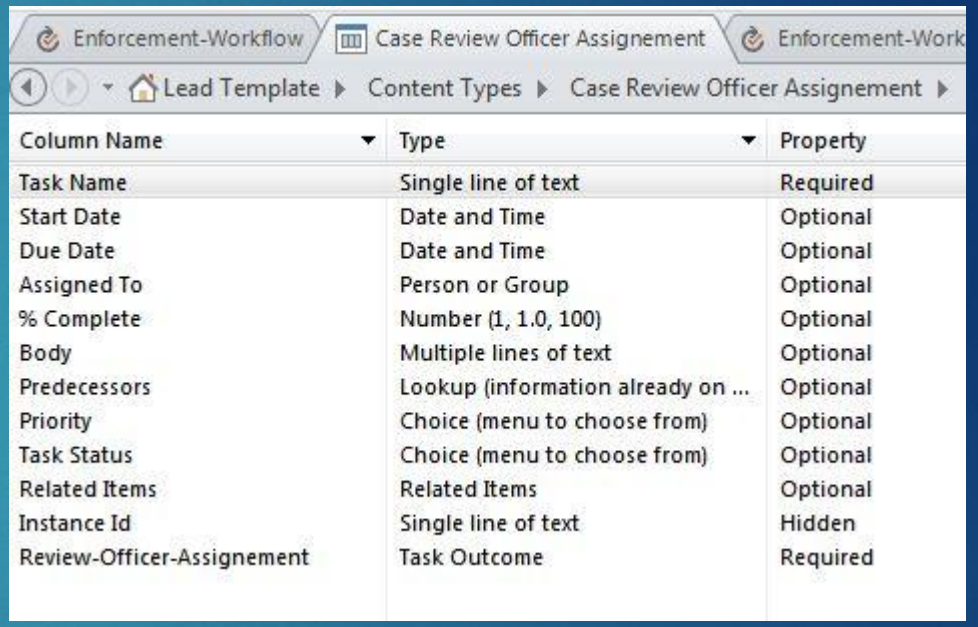




Task Driven Custom 2013 Workflow Process

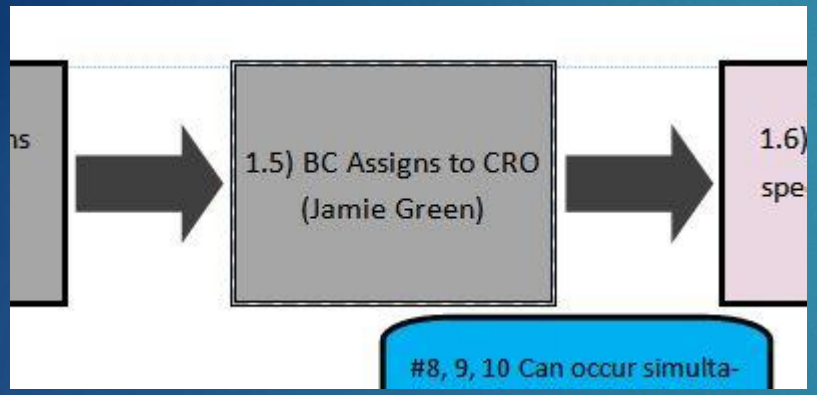
- Custom Site Columns
- Content Type Creation
- Task Tracking





Workflow Creation

- Business processes converted to SharePoint Workflow Stages
- Stage progression driven by task completion



Stage: Case Review Officer (CRO) Assignment

Log Case Review Officer Assignment Stage ... to the workflow history list

then Add 0 months, 7 days, 0 hours, 0 minutes to Today (Output to Variable: CROAssignDate)

Step: Case Review Officer Task Process

Log Case Review Officer Task Assignment S... to the workflow history list

then Assign a task to Case Roles:Staff (Task outcome to Variable: CRO-Assign-Task | Task ID to Variable: TaskID)

Loop: CRO Task Loop

The contents of this loop will run repeatedly while: Variable: CRO-Assign-Task not equals Case Review Officer Assigned

Log Case Review Officer Assignement Task ... to the workflow history list

then Assign a task to Case Roles:Staff (Task outcome to Variable: CRO-Assign-Task | Task ID to Variable: TaskID)

then Set Variable: CROValue to Case Roles:Staff

If Variable: CROValue is empty

Step: Case Review Officer Case Role Assignment

Assign a task to Case Roles:Staff (Task outcome to Variable: CRO-Assign-Task | Task ID to Variable: TaskID)

Loop: Case Role CRO Loop

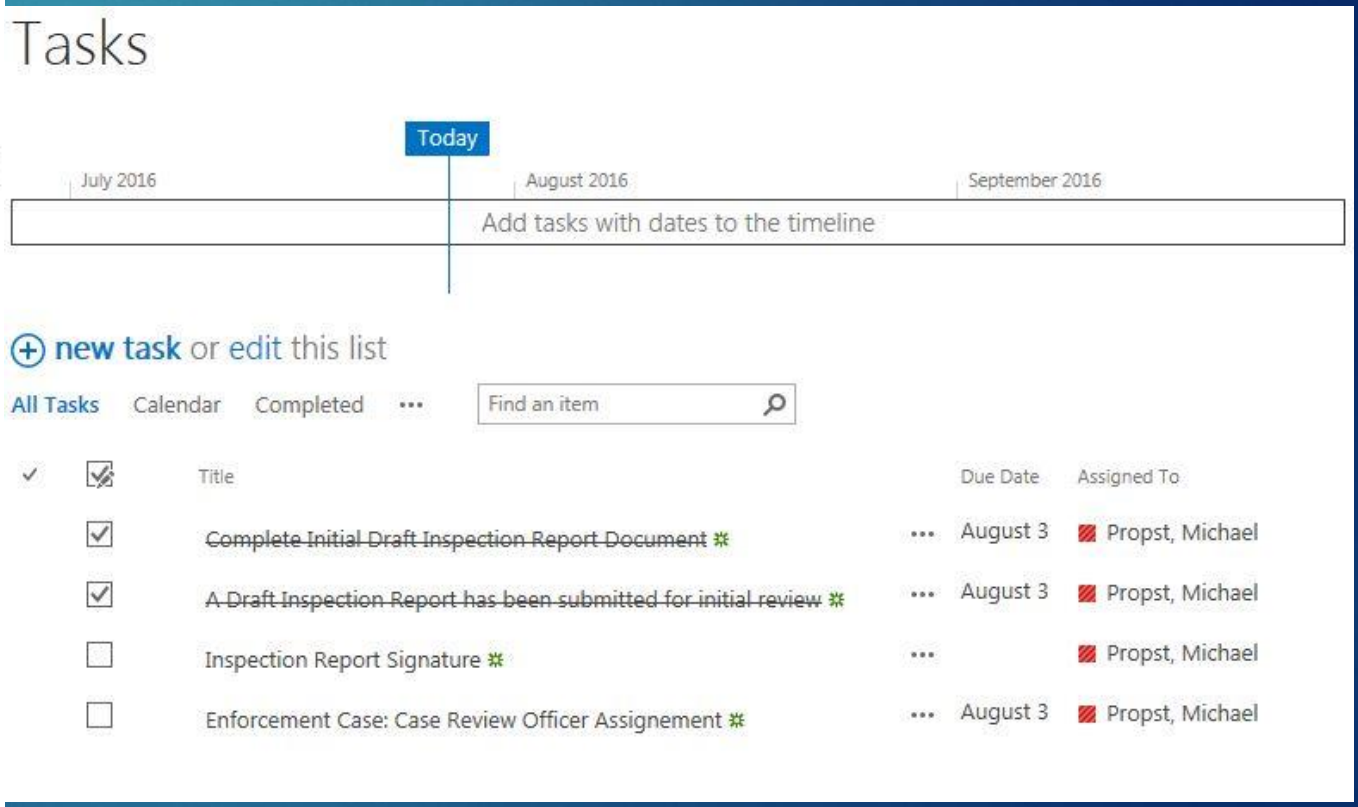
The contents of this loop will run repeatedly while: Variable: CRO-Assign-Task not equals Case Review Officer Assigned

Log Case Review Officer Assignement Task ... to the workflow history list

then Assign a task to Case Roles:Staff (Task outcome to Variable: CRO-Assign-Task | Task ID to Variable: TaskID)

Task Control

- Task assigned through email
- Due dates calculated automatically
- Overdue notices sent
- Task list overview



Summary

- Accessible to program staff, regional counsel, and management
- More efficient
  - All electronic records in one location
  - Collaboration and review of case documents
- Easily modified to fit other enforcement programs
  - Media specific
  - Cross Regional
  - Agencies

Questions?

- Special thanks for input and assistance: Jeffery Robichaud; Diann Sandridge, Erin Weekley, Denise Dantzler